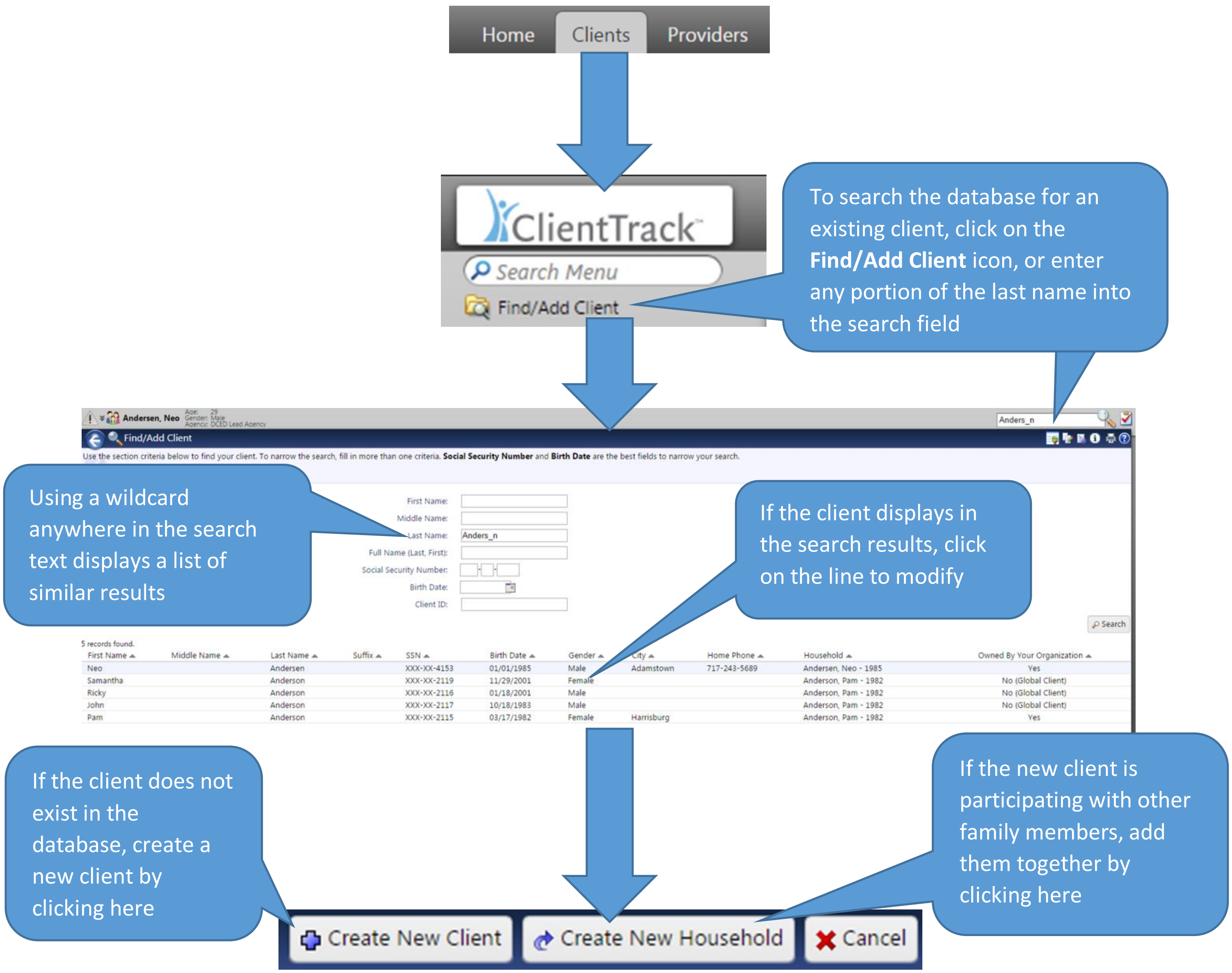
PA HMIS – Client Intake

This quick reference guide outlines the components of the ClientTrack HMIS solution related to the client intake process.

Find/Add Client

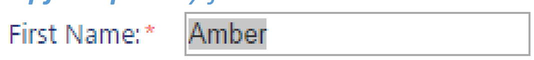
The **Find/Add** Client feature is designed to enter new clients into the system, while maintaining data quality and preventing duplicate clients.

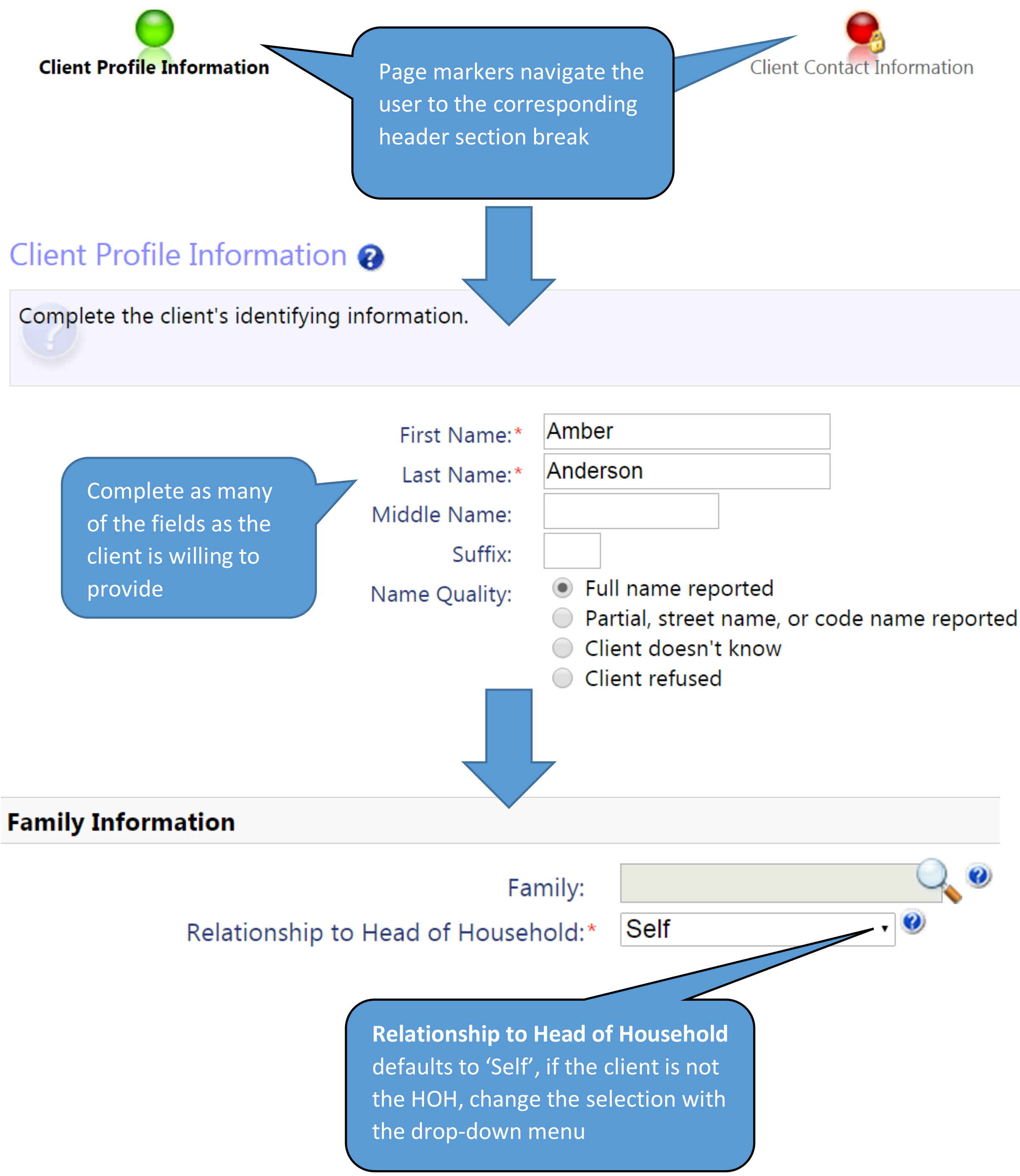
Helpful Tip: *Clients are differentiated within the database by two categories:* ***Owned Clients*** *are those that were entered by the organization and can be edited &* ***Global Clients*** *are those that were entered by another organization and can be viewed only.*



Create New Client

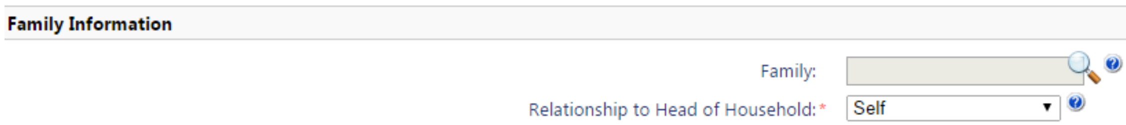
Helpful Tip: *Only fields with a red asterisk are required to save the information*

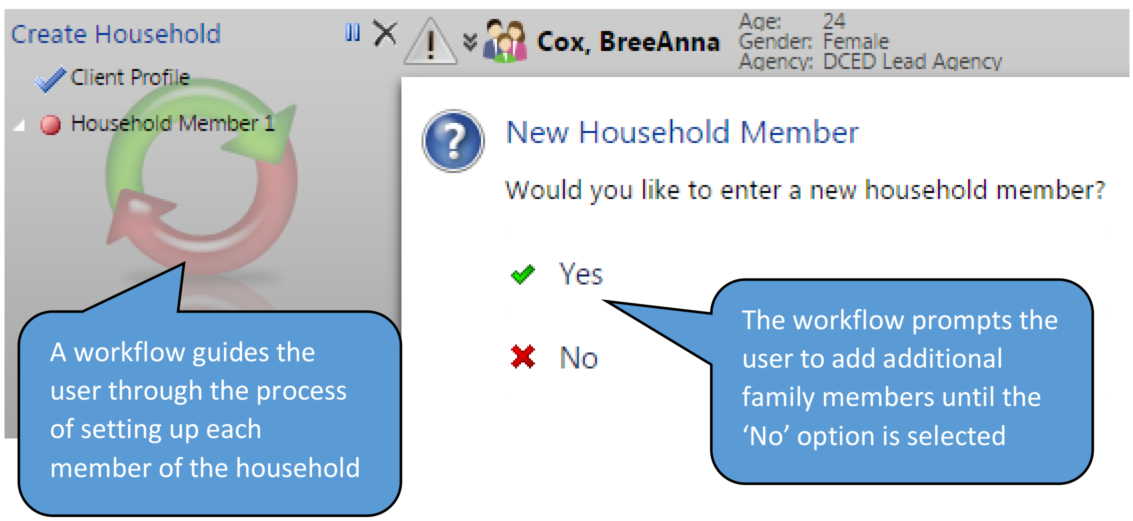




Create New Household

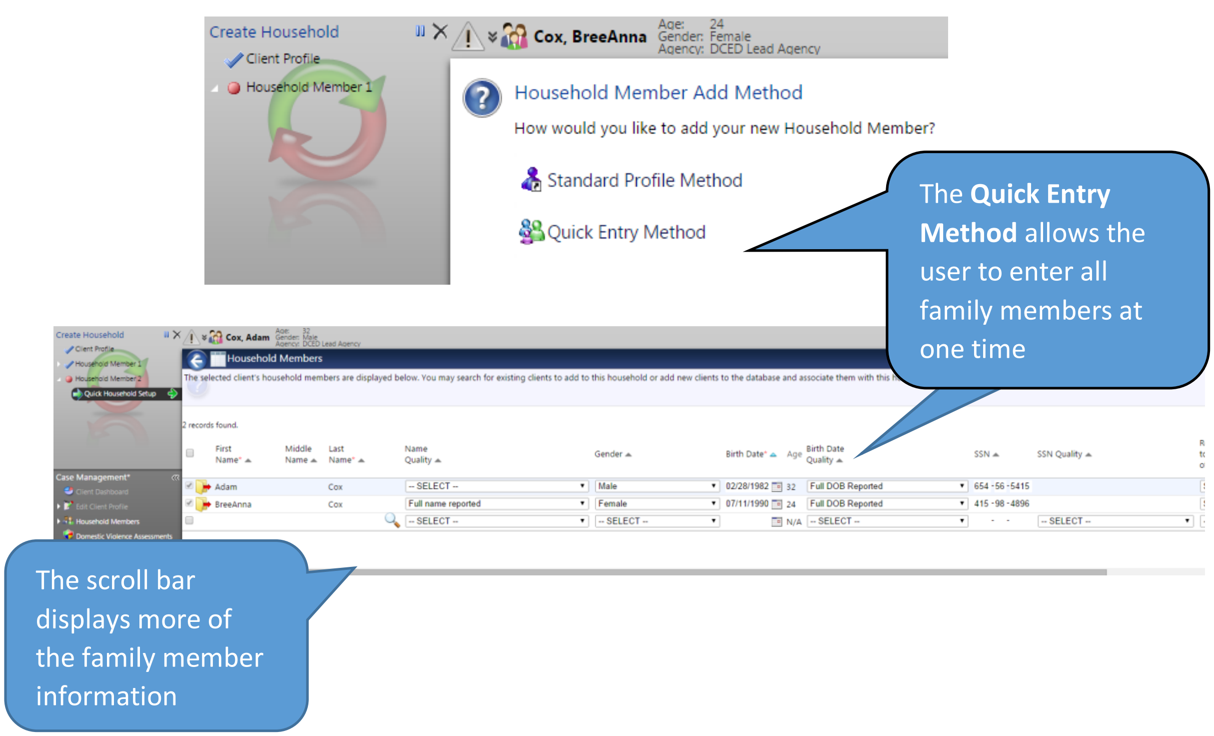
Helpful Tip: *If the individual is a member of a family, ensure there has been a head of household established, or assign the client as the head of household*





Quick Household Setup

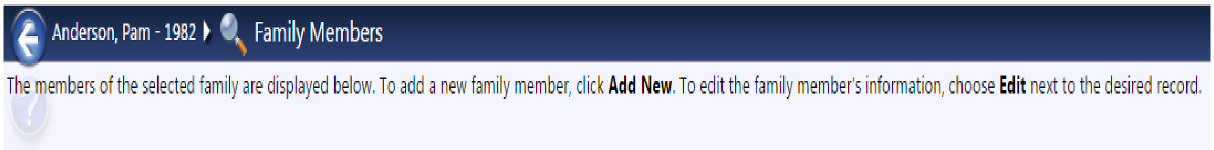
Household members can be added together on the same form

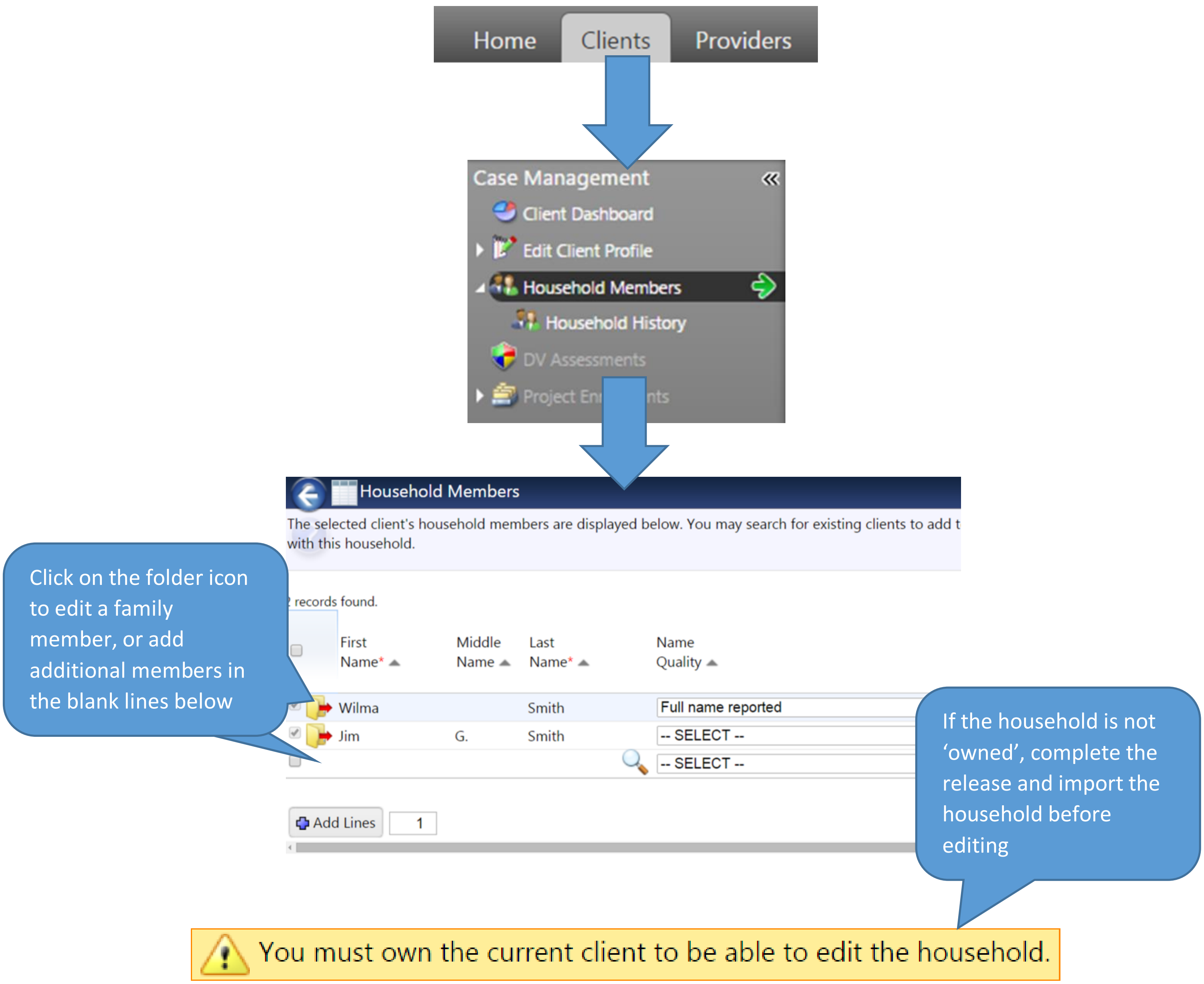


Household Members

Household members can be added manually outside of the initial intake process.

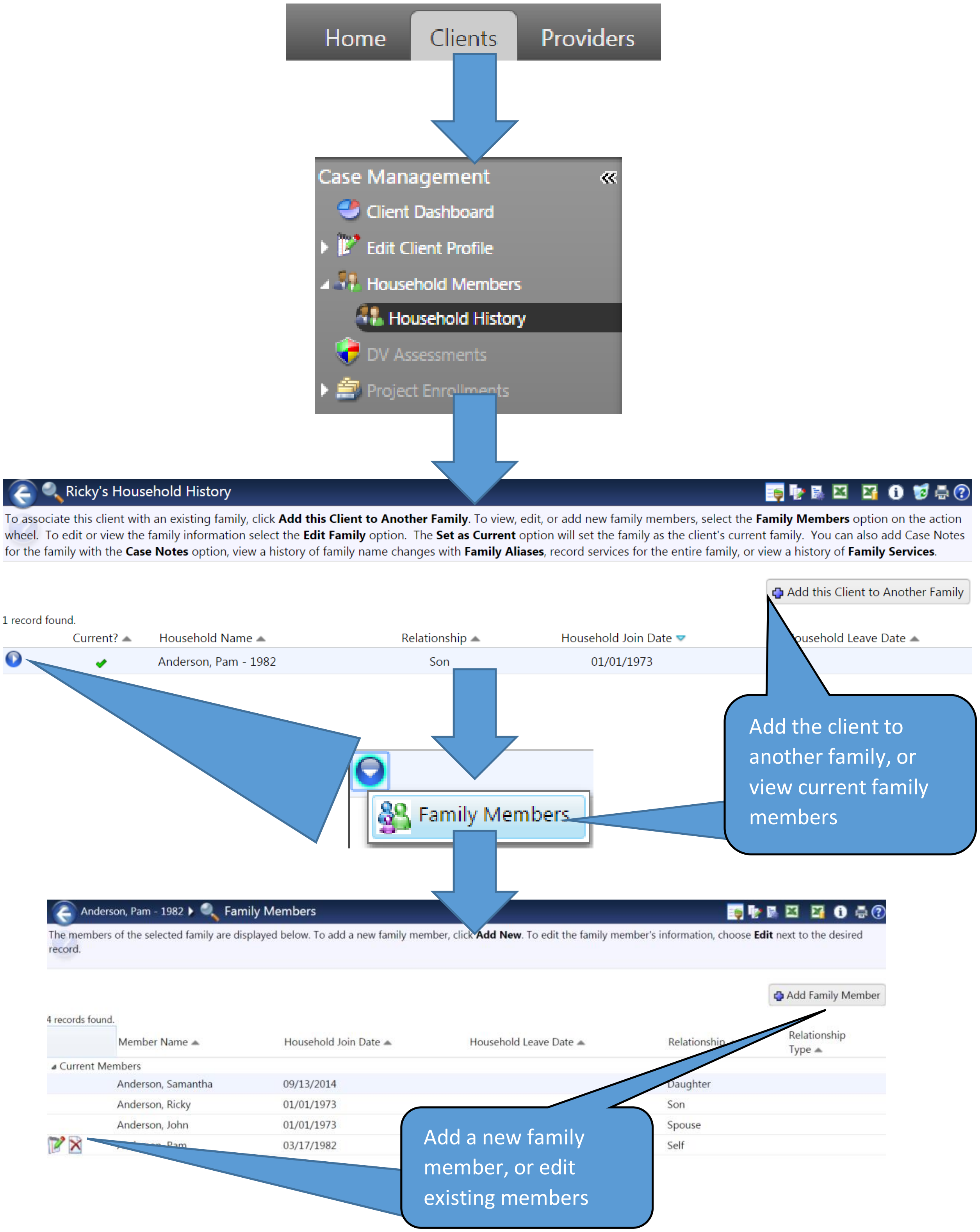
Helpful Tip: *The help text built into each form instructs the user how to utilize the features.*





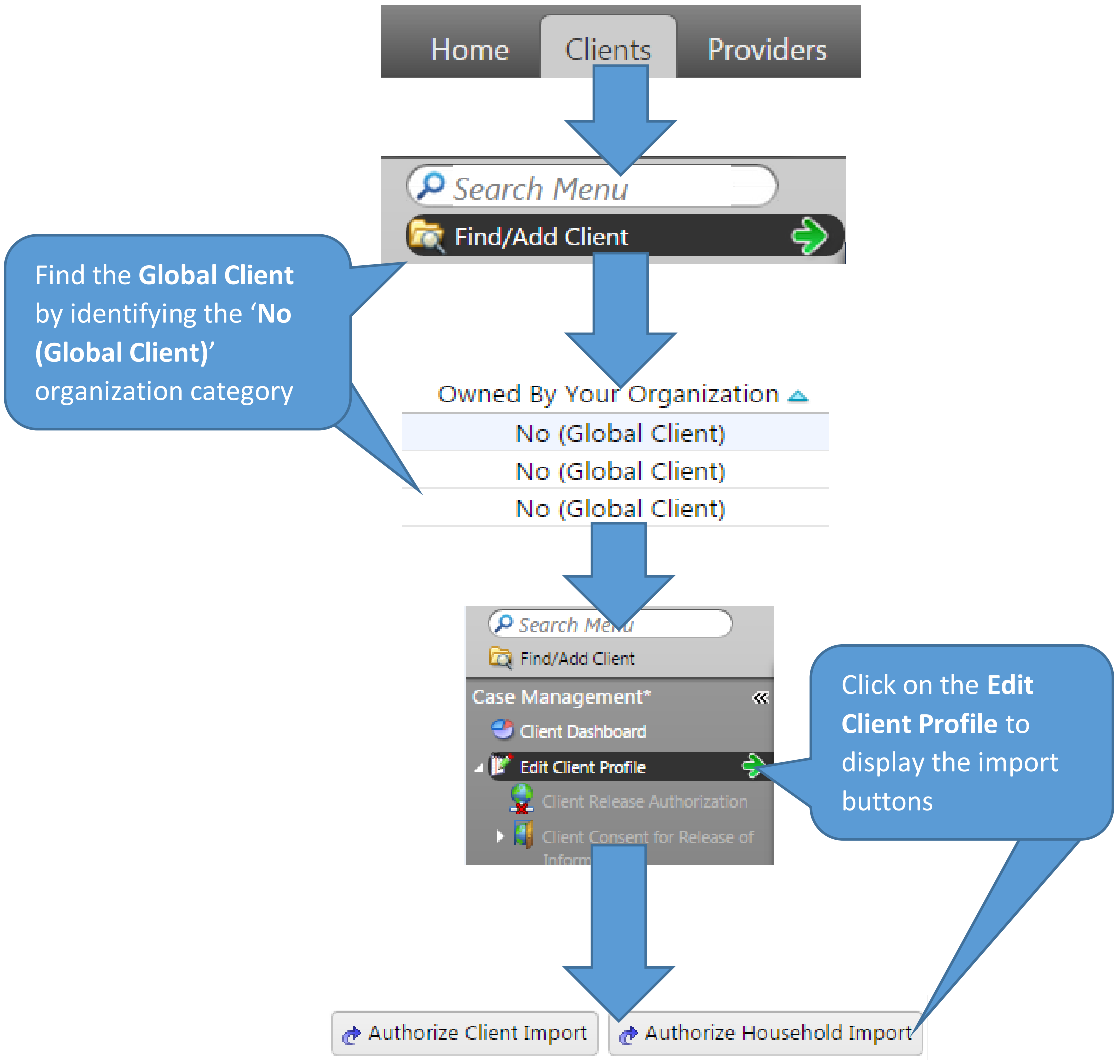
Household History

Household members can be viewed, edited and monitored if necessary.



Importing Client Information

Global Clients that need to be edited or enrolled into your organization can be imported individually, or by household, once the client has provided their authorization and a *Client Release to Agency Authorization* form has been completed.

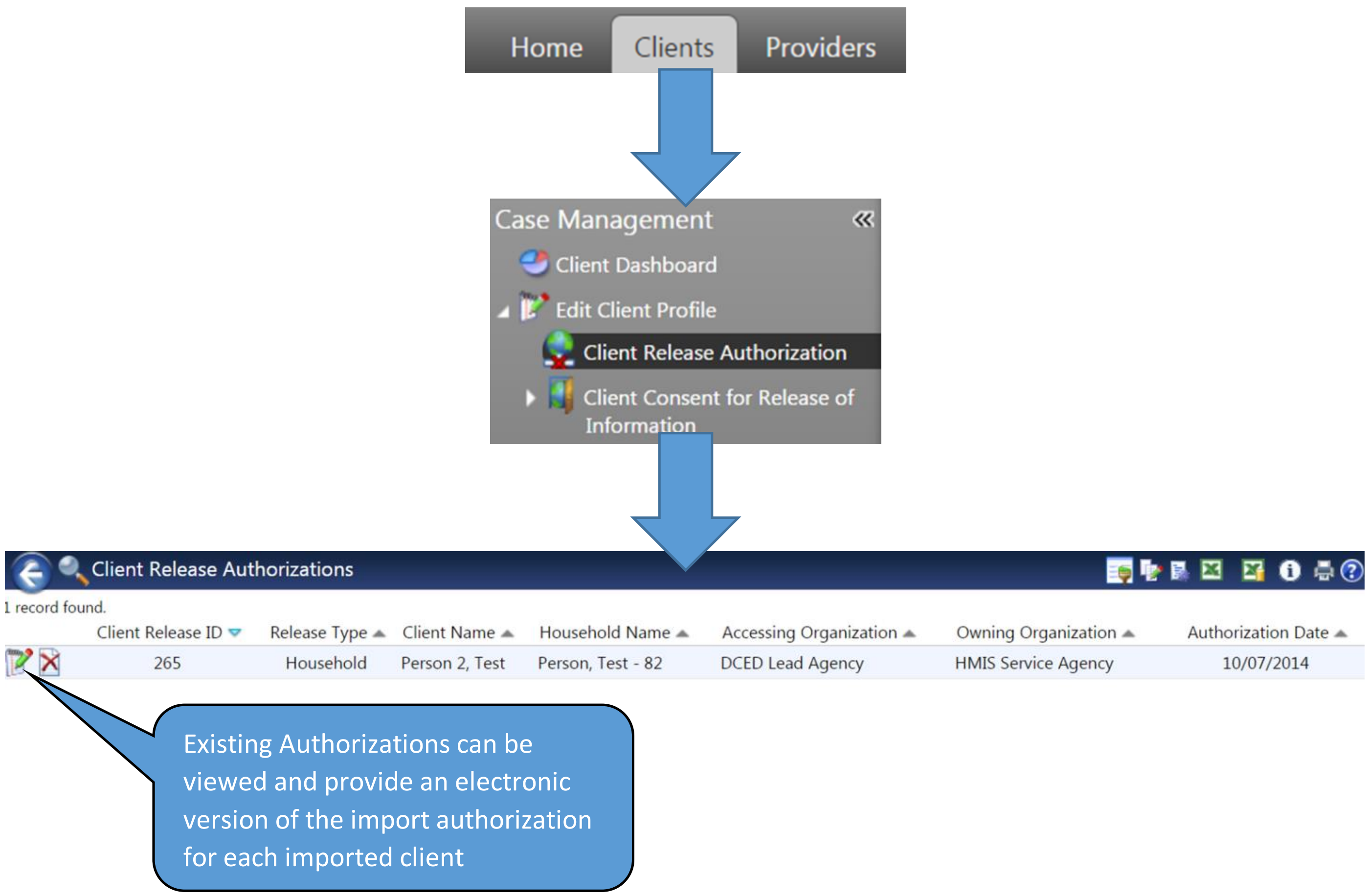


Helpful Tip: *Remember, the* ***Authorize Household Import*** *button only displays if the client has at least one other household member available for import*


Household Authorization Release to Agency
Household Information
Current Client Name: Person 2, Test
Household Name: Person, Test - 82
Household Members:* Import - Person, Test
Click the green check mark to select the **Household Members**
Organizational Information
Owning Organization: HMIS Service Agency
Release to Access Organization: DCED Lead Agency
Household Release to Agency Authorization
Authorized By Household:* Yes
Authorization Date:* 10/07/2014
Authorization Method:* Written
Household Release to Agency Upload:
Authorization to Release Records
Choose File autorization.PNG
Delete Associated File
The **Choose File** button allows the user to attach the authorization document, or a photo can be taken directly from the device by clicking on the camera icon
Complete the required information and click on the **Begin Import** button
Associated File: No Image
Release Type:* Household
Creating User: Kamrin Carver
Begin Import
Household Member Import Completion
This Household Member has been imported into your agency and all transactions that are created and "shared" will be broadcasted throughout the system to other agencies that also have imported this client. Please select "Save" to complete this process and move to the next "Household Member", if applicable. When loading this client in the future you will have access to the full client profile and data collection functions along with associated shared transactions.
Import Date: 10/07/2014
Client Name: Person, Test
New Agency: DCED Lead Agency
When the import is complete, the confirmation message displays in the header

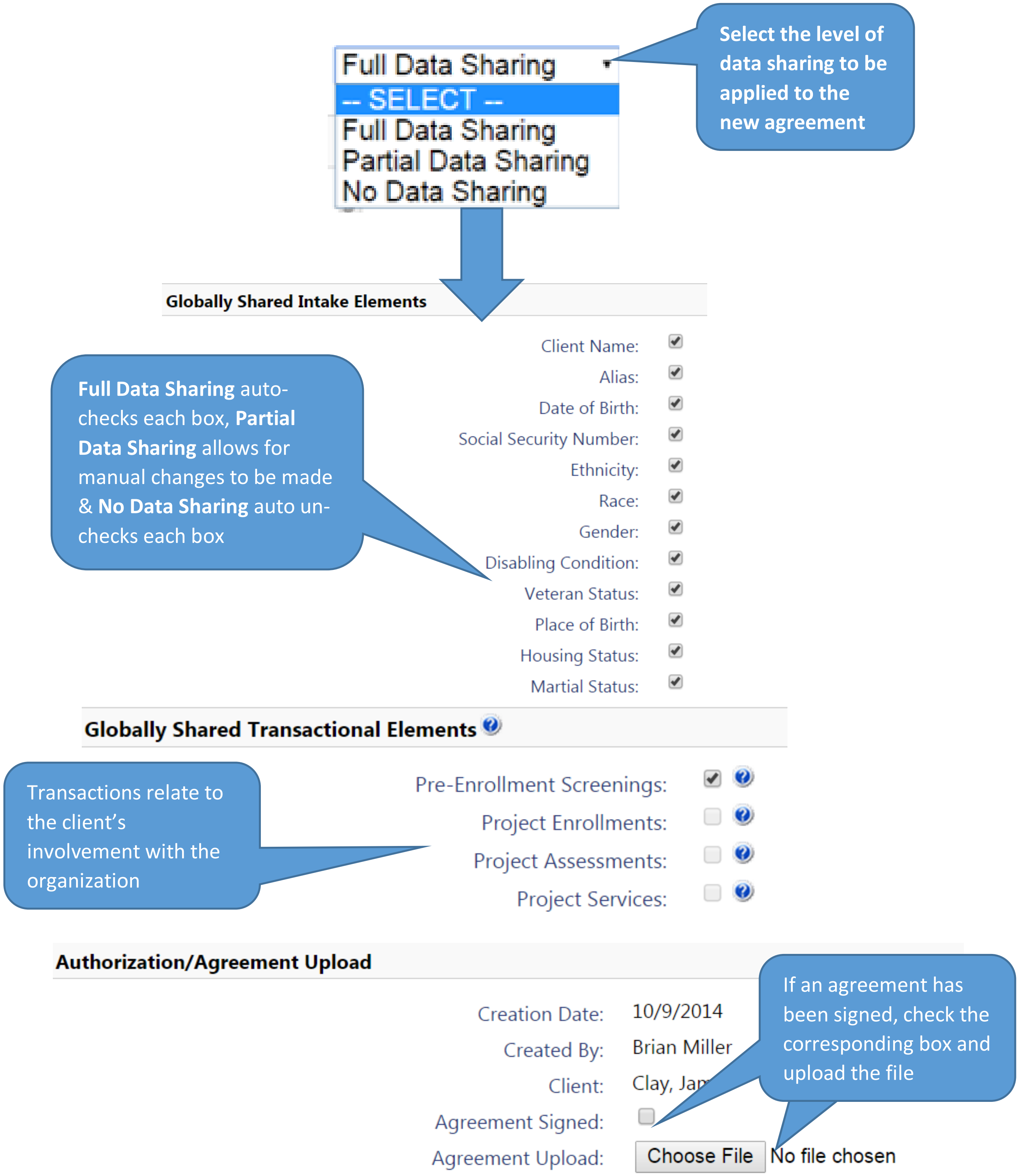
Client Release Authorization

Helpful Tip: *prior to performing a client or household import you must be provided with either written or verbal authorization from that client to view their previously entered data from another organization*



Client Consent for Release of Information

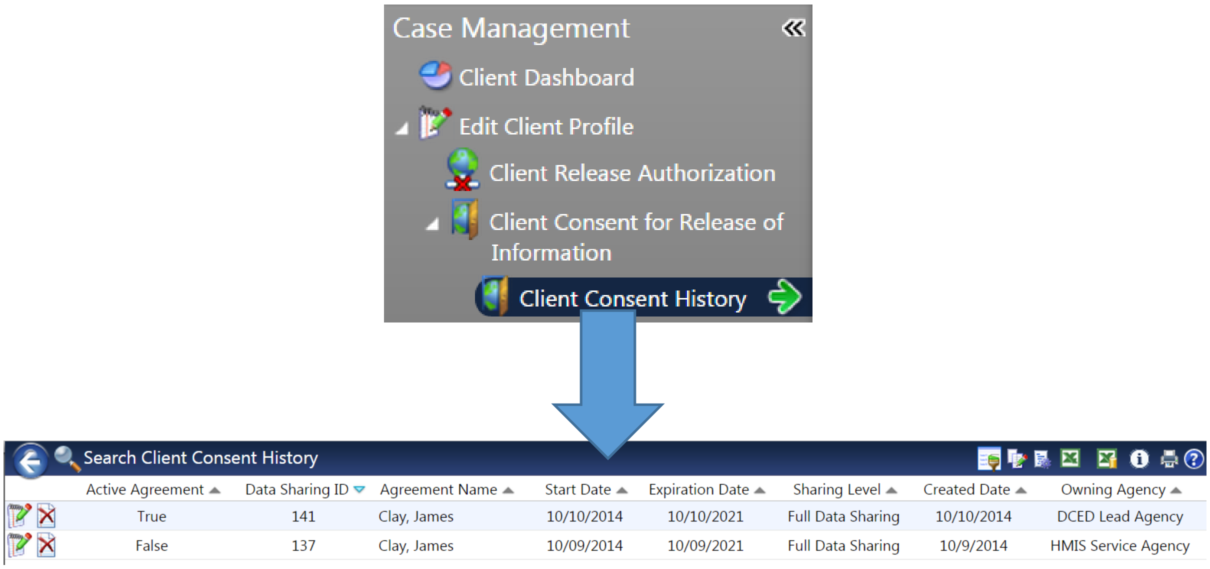
Helpful Tip: *Each client being enrolled into a project must have a data sharing policy enacted. A signed* ***Client Consent / Release of Information Form*** *is required prior to sharing any data globally throughout the system. Until project enrollment is complete, no data sharing policy is necessary.*


Full Data Sharing
-- SELECT --
Full Data Sharing
Partial Data Sharing
No Data Sharing
Select the level of data sharing to be applied to the new agreement
Globally Shared Intake Elements
Client Name:
Alias:
Date of Birth:
Social Security Number:
Ethnicity:
Race:
Gender:
Disabling Condition:
Veteran Status:
Place of Birth:
Housing Status:
Martial Status:
Full Data Sharing auto-checks each box, Partial Data Sharing allows for manual changes to be made & No Data Sharing auto un-checks each box
Globally Shared Transactional Elements
Pre-Enrollment Screenings:
Project Enrollments:
Project Assessments:
Project Services:
Transactions relate to the client's involvement with the organization
Authorization/Agreement Upload
Creation Date:
10/9/2014
Created By:
Brian Miller
Client:
Agreement Signed:
Agreement Upload:
Choose File
No file chosen
If an agreement has been signed, check the corresponding box and upload the file

Client Consent History

Each client consent form that has been created is viewable from the **Client Consent History** screen.

⚠ Historical Client Consent Forms are available only in read only mode.



	Active Agreement	Data Sharing ID	Agreement Name	Start Date	Expiration Date	Sharing Level	Created Date	Owning Agency
	True	141	Clay, James	10/10/2014	10/10/2021	Full Data Sharing	10/10/2014	DCED Lead Agency
	False	137	Clay, James	10/09/2014	10/09/2021	Full Data Sharing	10/9/2014	HMIS Service Agency

Helpful Tip: *The owner of the Client Consent ROI is the most recent updating agency. The release authorizations are good for seven years.*